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City of Alameda  
Code No. 7560  
Approved by C.S.B.  
July 7, 1999

## CUSTOMER SERVICE REPRESENTATIVE

### **DEFINITION**

Under general supervision performs a variety of difficult and/or complex clerical work in connection with customer accounts services and activities for all business lines. Performs other related work as required.

### **DISTINGUISHING FEATURES**

Positions in this class perform highly responsible customer service and accounts clerical work, and may be responsible for providing lead direction and/or for the independent performance of particularly difficult and specialized work. Incumbents are expected to exercise proficiency in a variety of additional functional areas. Examples of these functional areas include: payment processing system balancing/maintenance; active accounts collections; closed accounts collections; exception billing. Periodic adjustment of functional areas may occur to meet organizational needs. Actual responsibilities may vary according to assignment.

### **EXAMPLES OF DUTIES**

1. Performs routine, varied and complex clerical customer account work including receiving and processing payments, cashier functions and preparing bank deposits.
2. Receives customer inquiries, provides information, explains policies and procedures, resolves complaints of complex issues and promotes the acceptance or adoption of products and/or services.
3. Maintains and reconciles a variety of customer billing and account maintenance records.
4. Computes, verifies and reconciles figures on computerized records, customer billings, and other documents.
5. Gathers, sorts and searches records and files to provide factual data and traces discrepancies to balance and reconcile accounts.
6. Performs responsible document and data organization.
7. Maintains files and record keeping systems; compiles information and performs records research.
8. May perform payment processing system balancing/maintenance work including balancing daily postings for all cashiers, complex payment inquiries research, and/or serving as lockbox service liaison.
9. May perform active accounts collections work including establishing complex customer credit arrangements with customers whose accounts are delinquent and preparing daily field collections work.
10. May perform closed accounts collections work including establishing complex credit arrangements for accounts that have been closed or written off through referral to collections agencies, etc. and including administrating closed accounts collections efforts through small claims court, etc.
11. May perform exception billing work including performing complex billing calculations, monitoring computer-generated exceptions, and adjusting billed accounts as needed.
12. May perform field order maintenance work including preparing daily on and off field off-cycle meter reading work and administering accounts requiring field action.
13. May perform customer account maintenance work including administering customer deposits and other customer billing arrangements.
14. May perform customer account processing work including verifying, maintaining and processing customer orders.
15. May coordinate various projects or activities as assigned and assist in the development of work methods, systems and procedures.
16. May provide lead direction and training.

(OVER)

## **EMPLOYMENT STANDARDS**

### **Education/Experience**

Any combination equivalent to education and experience likely to provide the required knowledge and abilities. A typical way to obtain the knowledge and abilities would be:

**Education:** Graduation from high school.

**Experience:** Three years of responsible experience in heavy telephone or public contact in accounting/clerical work, customer service or credit/collections and in the preparation and processing of accounting, bookkeeping, statistical, billing or other financial records.

### **Knowledge**

Knowledge of cashiering and customer service processes, routine delinquent account procedures, and billing calculation procedures; the principles and practices of automated financial record keeping; general accounting principles and terminology; modern office practices and procedures including applications of information systems; modern office equipment including personal computers; filing methods and systems.

### **Ability**

Ability to perform difficult and/or complex customer service and accounts clerical work, including that related to designated functional areas of responsibility, with speed and accuracy; effectively operate a variety of modern office equipment including computers and related software; interpret, apply and explain established policies and procedures; perform arithmetic calculations; work effectively under pressure and with frequent interruptions; establish and maintain accurate records; communicate effectively; establish and maintain effective working relationships with employees and the general public; provide lead direction and training.

### **Typing Skill**

Ability to type from clear printed copy at a speed of 25 net words per minute.

### **10-Key Skill**

Ability to operate a 10-key calculator by touch.

### **Other Requirements**

Selected positions require possession of a valid California Driver's License and satisfactory driving record as a condition of initial and continued employment.